

Synchronist Cluster Scenario Analysis

“Data mining” is easily accomplished with e-Synchronist x-Tool. The following sample x-Tool analysis techniques can be used to identify specific groups of companies with shared characteristics within a specific scenario. Some have potential to be tapped while others have problems that can be addressed for and/or by the group.

These are only examples. They can be modified with the addition of any other piece of interview data or with company criteria to further refine the group of companies identified. The general format is:

- Topical issues or parameters
- Company parameters
 - Parameters frequently used include:
 - Geographic location (within a region)
 - NAICS / Industry
 - Employment size
 - Local vs. branch presence
 - Number of patents
 - Where R&D takes place (in-state/region or outside)
- If you identify a filter you find useful, please send them along with a note describing your use so we can check them out for use by other Synchronist Users. Eric, ecanada@blanecanada.com

Screens Useful for Partners and Clients

- **Manufacturing Extension Program (MEP)**
 - **Very High Risk Companies**
 - Product Life Cycle - maturing and declining
 - New product introductions
 - None recent past
 - None planned
 - Sales stable or declining
 - Over capacity in industry
 - Limited or no new product R&D
 - Technology change
- **MEP and Workforce (challenges)**
 - Technology change
 - Workforce stability
 - Workforce training budget increasing
 - Workforce skill gaps
 - Unfilled positions increasing

Synchronist x-Tool Use

First, save the x-Tool spread sheet to your desktop or hard drive. Follow the instructions on the instructions tab.

To use x-Tool Screening techniques, the filter pull-downs must be visible on the data worksheet. If the filter pull-down is not visible at the top of each column on the data sheet, go to the text menu, click on Data, scroll down to filter and click on the Auto filter option.

When a column filter has been set, the pull-down arrow for that column will turn blue as a reminder.

The form should be set to manually recalculate. (Tools, Options, Calculate, Manual) Once you have set your column filters, use the F9 function key to force a recalculation and graphing. The recalculation progress will show in the lower left corner of the x-Tool.

Trick: When you set a filter, use the Color/Fill tool from the Excel tool bar to highlight the column that has been changed. This will make it easy to reset the filtered columns.

- **Workforce (growth oriented)**
 - R&D (new product development)
 - New products introduced
 - New product planned
 - Technology change
 - Workforce growing
 - Workforce training budget increasing
 - Workforce skill gaps
 - Unfilled positions increasing

- **Expansion**
 - Room to expand
 - Lease
 - Plans to expand
 - Ownership change
 - Growth barriers
 - Growth potential
 - Trouble with HQ

- **Worker Recruitment Risk**
 - Growth potential above 50
 - Plans to expand
 - Available workers = or <4
 - Recruitment problems = Yes
 - Recruitment problems = Community
 - No expand here = Yes

- **Real Estate Needs**
 - No room to expand
 - Plans to expand
 - New products introduced
 - New products planned

- **Entrepreneurship and Innovation Center**
 - R&D investment level
 - R&D focus (new product, production, product improvement)
 - Product life cycle status (mature, stable, emerging, declining)
 - New products planned
 - New skill training level
 - Technology orientation (every company is somewhere between a producer of technology to those who resist technology)
 - Growth potential
 - How management grows the business (fast adapter is very different than a leader/innovator)
 - % or # of technical workers (management, scientist, engineers)

- **Export Service**
 - Product Life Cycle
 - Company's primary market
 - Total company sales
 - Export sales as a percentage of total sales
 - Production facilities outside the country

- **Leased Facility Screen**
 - Lease facilities (yes)
 - Number of employees
 - Lease expiration date
 - Business sector
 - Facility type

Business Development Incentives Targets

For the State Department of Development and the Governors office it is a very BIG point when they can help a company via tax credits because they have can have a direct impact on growth (i.e. they do not offer workforce development or tech assistance solutions, etc).

The following identifies some of the relevant screens to identify companies that potentially qualify for these incentives. Additional detail can be added to screen for qualification criteria such as the number of employees, geographic location, etc.

- **Job Tax Credits**
 - Companies with Plans to Expand
 - Facility type (manufacturing, telecommunications, etc.)
 - Companies with Growth Potential (<60 percentile)
- **Investment Tax Credits**
 - Companies with Plans to Expand
 - Facility type (manufacturing, telecommunications, etc.)
 - In community since (<3 years)
 - Capital investment (<\$50,000)
 - Companies with Growth Potential (<60 percentile)
- **Optional Investment Tax Credits**
 - Companies with Plans to Expand
 - In community since (<3 years)
 - Capital investment (<\$50,000)
 - Companies with Growth Potential (<60 percentile)
- **Headquarters Tax Credit (attraction project)**
 - **Research & Development Tax Credit**
 - Facility type (manufacturing, telecommunications, etc.)
 - R&D investment
 - R&D on-site or in state
- **Retraining Tax Credit**
 - Training
 - Training Increasing
 - New skill training
- **Child Care Tax Credit**
 - Child care concerns (public service >3)
- **Small Business [fast growth] Tax Credits**
 - Companies with fewer than x employees

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Blane, Canada Ltd.
1506 Cadet, Suite 100
Wheaton, IL 60189

630.462.9222
info@blanecanada.com